# FOREIGN CROPS AND MARKETS.

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Feature of Issue: MUTTON AND LAMB

## INDIAN WHEAT ESTIMATE INCREASED; STILL BELOW LAST YEAR

The 1926 wheat crop of India is reported in the second estimate at 323,605,000 bushels, according to a cable from the Indian Department of Statistics. This is an increase of 3,397,000 bushels over the 320,208,000 bushels reported in the first estimate dated April 22, but still below the 1925 crop. The yield last year was reported as 328,608,000 bushels in the second estimate and 324,875,000 bushels in the final revised estimate. Acreage for this year, according to the fourth acreage estimate, is 30,288,000 acres against 29,899,000 acres reported in the third estimate this year, and 31,791,000 acres, the final revised estimate for 1925.

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## BRITISH PROHIBIT FRESH MEAT IMPORTS FROM CONTINENT

As a result of the discovery of foot and mouth disease in hog carcasses from the Netherlands intended for consumption in Great Britain, the British Ministry of Agriculture and Fisheries has prohibited the landing in Great Britain of all carcasses from continental European countries, according to a cable received in the Department of Agriculture from Agricultural Commissioner Foley at London. This order covers carcasses of cattle and sheep as well as hogs and also fresh and refrigerated meat of such animals, but does not cover fully cured bacon and ham or rendered fat, cooked or preserved meat or meat essences, or hides and skins which have been dry or wet salted. Imports from Ireland, the Channel Islands and the Isle of Man are not affected by the order.

This order, if the quarantine continues for any length of time, is of far reaching significance, not only for the meat trade of the United Kingdom and the Netherlands, but for that of all northern and western Europe and the United States. The large supplies of fresh pork which have been moving from the Netherlands to the British markets will have to seek other markets or be shipped as cured meat, and Great Britain will be obliged to look elsewhere for its supplies of fresh pork. In 1925 out of a total British importation of 139 million pounds of fresh and frozen pork, 92 million pounds were from the Netherlands, 20 million pounds from the Irish Free State, and 14-1/2 million pounds from the United States. Of the total of pork supplies in the London Central Markets in 1925, nearly 70 per cent was from the Netherlands. Beef and mutton supplies from the continent of Europe are of minor significance on British markets.

This is the first time that the British Government has prohibited the importation of any kind of fresh meat on account of foot and mouth disease although for several years there has been a strict quarantine against live animals from countries in which the disease was known to exist.

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## CROP PROSPECTS

### Growing Conditions

The first general crop report of the Manitoba Free Press for the season 1926 shows conditions generally favorable, with wheat seeding completed from a week to ten days earlier than in 1925. The moisture supply has been better than was anticipated and relatively little damage from any source was reported. Wheat acreages in both Saskatchewan and Alberta have been increased, according to this report. In Manitoba 60 per cent of all wheat seeded went in on summer fallow; in Saskatchewan, 50 per cent, and in Alberta, about 40 per cent.

For northern Alberta the United States Weather Bureau reports temperature during the week ending May 30 averaging nearly normal and heavy rainfall at the close of the week. Southern Alberta had good showers in some districts but in others the rainfall was very light. The temperature in Saskatchewan was 3 to 5 degrees above normal and northern and central Saskatchewan had several showers. In southern Manitoba the temperature was 6 to 9 degrees above normal.

The outlook for wheat in Italy early in May was for a good crop according to a mailed report from Dr. O. C. Stine of this Bureau. He stated that conflicting reports are current from official and private sources as to the size of the crop in comparison with the bumper crop of 1924, but added that it was too early to place much confidence in any definite estimate of the size of the harvest. A cable from the International Institute of Agriculture states that the condition of all grains in Hungary June 1 was well above average. The rainfall during the second half of May was average and development of the crops was favorable. Trade reports from Germany say that the weather during the second week in May was not particularly favorable for the growing crops, being generally too cool to facilitate rapid growth. The weather in France continued unfavorable through most of May. The crops were in need of warm, dry weather. The condition of winter cereals in Soviet Russia was reported to the International Institute of Agriculture as average on May 20. The condition of winter wheat on June 1 last year was slightly above average and spring wheat a little better. The Russian National Commissariat of Agriculture states that the delayed spring and the return of cold weather have retarded the growth of the crops. After May 7 beneficial rains fell in the dry regions in the south and southeast where dry weather had been experienced since the middle of April. There were abundant reserves of subsoil moisture which accumulated in the autumn and these had prevented crop deterioration.

The wheat condition of Egypt, the International Institute of Agriculture cables, was slightly below average on the first of June this year, whereas last year it was slightly above average. Barley is average. A report from India states that a temporary advance of the monsoon occurred in the Arabian Sea on May 15th, moving to the south of the Bay on May 16. The Central Provinces, Bengal and Bihar and Orissa, have had nearly general light rains and the outlook for the autumn crops is promising.

In the grain producing sections of Argentina the temperature during the week ending May 31 was slightly subnormal according to a report from the United States Weather Bureau. The average temperature in the northern wheat zones was 60 degrees, and in the southern section, 46 degrees, being in both cases 3 degrees below normal. The rainfall was again heavy in the north, the average being 1.4 inches or nearly 5 times the normal for the week. In the south only light showers occurred.

## CROP PROSPECTS, CONT'D

SMALL GRAINS: Acreage, average 1909-13, annual 1924-26

| Crop and country | Average 1909-13 a/ | 1924 | 1925 | 1926 Preliminary | Per cent 1926 is of 1925 |
|---|---|---|---|---|---|
| WHEAT (winter) | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | Per cent |
| Total, 18 countries b/c/ | 106,925 | 118,511 | 116,398 | 120,091 | 103.2 |
| WHEAT (winter and spring) | | | | | |
| Total, 7 countries d/ | 56,382 | 55,821 | 57,033 | 55,286 | 96.9 |
| RYE e/ | | | | | |
| Total, 14 countries f/ | 27,391 | 24,975 | 26,106 | 25,283 | 96.8 |
| BARLEY | | | | | |
| France | 1,987 | 1,765 | 1,772 | 1,731 | 97.7 |
| Italy | 647 | 573 | 576 | 593 | 103.0 |
| Czechoslovakia | 2,275 | 1,676 | 1,714 | 1,735 | 101.2 |
| Yugoslavia | 1,053 | 899 | 883 | 508 | 57.5 |
| Bulgaria | 516 | 393 | 544 | 534 | 98.2 |
| Morocco | 3,000 | 3,120 | 3,361 | 3,707 | 110.3 |
| Total, 7 countries | 9,483 | 8,426 | 8,850 | 8,808 | 99.5 |
| OATS | | | | | |
| France | 10,084 | 8,636 | 8,652 | 8,670 | 100.2 |
| Germany | 9,529 | 8,709 | 8,531 | 8,530 | 100.0 |
| Bulgaria | 408 | 373 | 354 | 400 | 113.0 |
| Morocco | 25 | 49 | 56 | 49 | 87.5 |
| Total, 4 countries | 20,046 | 17,767 | 17,593 | 17,649 | 100.3 |

a/ Where changes in boundaries have occurred as a result of the world war, estimates have been adjusted to correspond with the area within the post-war boundaries. b/ Estimates for earlier years given for comparison refer to winter acreage only where comparable statistics of winter seedings are available, in some of the minor producing countries where most of the crop is winter wheat and where abandonment is of little significance estimates of earlier years given for comparison are the final estimates of the total crop. c/ Includes England and Wales, France, Italy, Czechoslovakia, Bulgaria, Poland, Rumania, Lithuania, Finland, Belgium, Morocco, Algeria, Tunis, India, Yugoslavia, Canada, United States and Luxemburg. d/ Includes France, Czechoslovakia, Bulgaria, India, Algeria, Tunis and Morocco. e/ Estimates of earlier years for comparison are final estimates of the total winter and spring area harvested. f/ Includes France, Czechoslovakia, Bulgaria, Rumania, Poland, Lithuania, Latvia, Finland, Italy, Belgium, Yugoslavia, Canada, United States and Luxemburg.

C R O P  P R O S P E C T S, C O N T ' D

CEREAL CROPS: Production, 1924 and 1925

| Crop and country | 1924 | 1925 | Per cent 1925 is of 1924 |
|---|---|---|---|
| WHEAT | 1,000 bushels | 1,000 bushels | Per cent |
| Total, 43 countries.............. | 3,068,126 | 3,291,870 | 107.3 |
| Estimated world total excl. Russia: | 3,098,000 | 3,320,000 | |
| RYE | | | |
| Total, 28 countries.............. | 729,739 | 1,006,725 | 138.0 |
| Estimated world total excl. Russia: | 743,000 | 1,021,000 | |
| BARLEY | | | |
| Total, 39 countries.............. | 1,063,019 | 1,262,667 | 118.8 |
| Estimated world total excl. Russia: | 1,207,000 | | |
| OATS | | | |
| Total, 37 countries.............. | 3,644,029 | 3,930,757 | 107.9 |
| Estimated world total excl. Russia: | 3,675,000 | | |
| CORN | | | |
| Total, 21 countries.............. | 3,199,164 | 3,852,376 | 120.4 |
| Estimated world total excl. Russia: | 3,213,000 | | |

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## SUGAR

In accordance with the Cuban Crop Reduction Law, the President of Cuba has declared that grinding of next season's crop is to begin after January 1, 1927. In previous years, when no restrictions were placed on the opening of the season, grinding has usually begun during the last two weeks in November or the first week in December.

The sugarcane crop of Brazil is considered in good condition throughout the country, according to a report of May 12 from Vice Consul Allan Dawson at Rio de Janeiro. The Pernambuco harvest is about over. Cane cutting has begun in Minas Geraes, Sao Paulo and nearby states.

SUGAR: Production of cane and beet sugar in countries reporting for 1925-26

| Country | 1924-25 | 1925-26 | Per cent 1925-26 is of 1924-25 |
|---|---|---|---|
| BEET SUGAR | Short tons | Short tons | Per cent |
| Estimated world total a/ ........ | 8,973,475 | 9,077,670 | 101.1 |

C R O P  P R O S P E C T S,  C O N T ' D

SUGAR: Production of cane and beet sugar in countries reporting for 1925-26, Cont'd

| Country | 1924-25 | 1925-26 | Per cent 1925-26 is of 1924-25 |
|---|---|---|---|
| CANE SUGAR | Short tons | Short tons | Per cent |
| Total, 34 countries reporting .. | 17,404,049 | 17,689,527 | 101.6 |
| Estimated world total a/ ........ | 17,623,000 | 17,910,000 | 101.6 |

Official sources, International Institute of Agriculture, Sugar Association Estimates and Commercial Estimates.
a/ Exclusive of minor producing countries for which no data is available.

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RICE

Weather conditions have been favorable for the rice crop of the central and northern states of Brazil and the crop is prospering, according to a report of May 12 from Vice Consul Allan Dawson at Rio de Janeiro. Harvesting is already general and the yield satisfactory, being particularly good in Rio Grande so Sul. Plowing and planting are reported from the north.

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COTTON

The condition of the cotton crop in Egypt reported June 1 is 96 per cent of the average for the past ten years compared with 97 per cent at the same time last year, according to a cablegram from the International Institute of Agriculture. The same agency reports that the Russian cotton crop is seriously threatened because of lack of rain.

During the last ten days of April the temperature in Brazil was generally normal and the crop on the whole in good condition, according to Vice Consul Dawson quoting the Ministry of Agriculture. Planting took place in Bahia and the North. Consul Makinson at Callao-Lima reports that the condition of the Peruvian crop as of the first of May was still good but not so good as on April 1. During the first quarter of this year Venezuela experienced the most severe drought that has occured in years, and the cotton crop was a failure, states Vice Consul Williams at Caracas. In Barbadoes during April continued damage from the pink boll worm caused planters to destroy their plants, at the suggestion of the Director of Agriculture, reports Consul Watson. In only a few fields was there a second picking, and the quantities obtained were very small.

## C R O P  P R O S P E C T S, C O N T ' D.

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### COTTON, CONT'D

COTTON: Production 1924-25 and 1925-26

| Region | 1924-25 | 1925-26 | Per cent 1925-26 is of 1924-25 |
|---|---|---|---|
| | 1,000 bales | 1,000 bales | Per cent |
| Regions previously reporting and unchanged | 24,473 | 27,488 | 112.3 |
| Estimated world total | 24,800 | 27,800 | 112.1 |

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### TOBACCO

Adverse weather conditions have retarded the growth of the tobacco leaf in some of the zones of Minas Geraes, Brazil, according to a report of May 12 from Vice Consul Allan Dawson of Rio de Janeiro, Brazil. Average temperature and scanty rains were reported for all Brazil except in the north where the rainfall was heavier. Harvesting is going on in Sao Paulo and Santa Catharina, planting in Parahyba, Bahia, and Sao Paulo and plowing in Sergipe.

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## L I V E S T O C K,  M E A T  A N D  W O O L

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### Hogs and pork

STRIKE REDUCES MAY LONDON PORK SUPPLIES: Unseasonably low supplies of pork were handled in London central markets during May as the result of the general strike, according to preliminary figures cabled by E. A. Foley, American Agricultural Commissioner at London. At 1,021,000 pounds, British and Irish pork was 121,000 pounds and 724,000 pounds under April 1926 and May 1925 respectively. Continental pork reached 2,923,000 pounds, a reduction of 4,601,000 pounds below the preceding month and of 480,000 pounds below May 1925. At Liverpool, stocks of hams, bacon and shoulders on May 31 stood at 12,367 boxes and lard totaled 4,426,000 pounds. Both of those figures were considerably below the figures for the preceding month and for the same date last year.

BRITISH BACON MARKET STEADY: Bacon prices at Liverpool were steady to firmer for the week ended June 2, according to cabled advices from E.A.Foley, American Agricultural Commissioner at London. American bacon was not quoted. See page 811.

GERMAN PORK MARKET MAINTAINS STRONG TONE: German pork prices for the week ended June 2 maintained the stronger tendencies of the last few weeks, according to a cable from W.A. Schoenfeld, American Agricultural Commissioner at Berlin. Lard at Hamburg reached a new high level for the year at $18.39 per 100 pounds. See page 811.

## EUROPEAN BUTTER PRICES HIGHER; NORTH AMERICAN PRICES UNCHANGED

Quotations on the Copenhagen and London butter markets were generally higher on June 4 than a week earlier. At the same time the New York and Montreal markets showed no change. The New York price on 92 score at 41 cents is still below the price of last year while European markets were practically the same as a year ago, at prices for best grades ranging from 2 cents to 5 cents below New York. The demand is reported better in the London market than a week ago when there was still apparent some effect of the strike disturbance. Montreal prices continue 7 cents under New York on best grades. A detailed statement of comparative prices appears on page 811.

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## THE WALNUT SITUATION IN FRANCE

It is as yet too early to make any estimates of the coming walnut crop in France but conditions were generally favorable for tree crops up till the middle of May, and in the Bordeaux region, prospects point to a good yield, according to a cable received in the Department of Agriculture from Consul Lucien Memminger at Bordeaux. The recent cold and storms in France are reported not to have done any damage in the Bordeaux region, while almonds and olives in other sections were little affected, only peaches and cherries being serious damaged. Fairly large stocks of nuts are still on hand in some sections, but the quality of much of these is too poor for export to American markets and it does not appear likely, therefore, that exports to the United States will be large during the balance of the season.

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## MARKET CONDITIONS IMPROVING IN WESTERN EUROPE

Markets for raw materials and foodstuffs in countries of western and northern Europe in general show some improvement as compared with a month ago, according to reports received through the Department of Commerce and other sources. Great Britain has by no means recovered her pre-strike status, but indications there point to a gradual recovery of the ground lost. Germany appears to be steadily working out of the recent period of depression while industrial activity continues in France and Italy.

### Great Britain

At the end of May, market conditions in Great Britain were gradually recovering from the effects of the general strike of May 4-12. Many primary industries, including coal mining, are still idle. Stocks of finished goods, however, have not been exhausted, and orders are being filled. In the cotton industry production is irregular with a 35 hour week generally observed. Yarn stocks are again accumulating and the adversability of still shorter time is being discussed. There has been some improvement in demand for finished goods from India and China, but continental sales have been restricted by recent fluctuations of the franc and lira.

MARKET CONDITIONS IMPROVING IN WESTERN EUROPE, CONT'D.

The wool trade has suffered to some extent from the strike but some new business in wool and tops is reported, with firm prices for tops. The uncertainty of delivery has resulted in some cancellations of piece good orders. The third series of London wool sales began on June 1 and is scheduled to close on June 10. There were no American buyers at the opening, according to a cable from E. A. Foley, American Agricultural Commissioner at London, but competition was good among other buyers. Merino opened at prices equal to those ruling at the close of the previous sales, but crossbreds were 5 per cent lower.

## Germany

The acute phase of the German industrial depression appears to be passing. There is a distinct decline in bankruptcies, receiverships, protested drafts and similar indicators, with some improvement in the employment situation. A definite industrial and commercial reorganization appears to be in progress in Germany, and this reorganization has been to some extent favored by the depression which has eliminated many unproductive businesses and forced the consolidation of other enterprises. The currency remains on a stable basis and interest rates have fallen rapidly. April was the fifth successive month in which Germany has had a surplus of exports over imports. While the depression of the last few months has been severe, it seems possible that Germany may emerge from it in an economic position even stronger than that of last year. Such a recovery and stabilization of business should be favorable to increased imports of American raw cotton and to a lesser extent to imports of grains and feedstuffs.

## Italy

Italian market conditions remain satisfactory. Unemployment is at an unusually low level and no severe business depression is expected. Textile industries, however, are meeting with increased competition in export markets. The outlook is for sustained markets for raw cotton in the immediate future. Italian imports of American wheat and pork products have been very low this season, but the reason for the reduction is to be found more in supply and price rather than in conditions affecting demand.

## France

France is taking a somewhat smaller volume of American cotton than last season, but mill activity continues fairly strong. General industrial conditions would appear to be favorable for marketing food products, but importations have been discouraged by governmental regulations.

## Netherlands and Belgium

Market conditions in the Netherlands are strong although there has been some slackening of industrial and commercial activity. As compared with last year, however, business conditions show improvement. In Belgium the situation is less favorable although the cotton spinning industry is relatively active and total unemployment is lower than last year. The most serious feature of the present situation in Belgium is the uncertainty as to the fiscal policy of the government and the consequent instability of the currency.

MARKET CONDITIONS IMPROVING IN WESTERN EUROPE, CONT'D.

## Denmark, Norway and Sweden

The British labor conflict has reacted unfavorably on Danish agriculture and general business. The same volume of production for export has been maintained but prices have been seriously depressed. Unemployment has declined, but it is still above the figures of a year ago. Business conditions in Norway are characterized as dull, and there is a high percentage of unemployment in industry. Export trade, however, is kept at a high level and imports show a tendency to rise. Swedish industrial and business conditions are moderately active. The government has refused to give financial aid to the sugar industry and in consequence there will be only a small acreage devoted to sugar beets and heavy imports of sugar will be required.

## Poland

It is too early to determine the effect of the Pilsudski coup d'etat upon the economic situation in Poland. Polish industrial conditions had been very unsatisfactory for several months, with a serious degree of unemployment. There was a slight improvement in the textile industry in April with a slump again in May. There seems to be nothing in the present situation in Poland to indicate an early improvement in the markets for farm products.

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# LARGER WORLD MUTTON AND LAMB SUPPLIES

Potential supplies of mutton and lamb for 1926 in exporting countries are indicated to be no less and probably larger than in 1925. There are indications also of increased production in most importing countries. Present conditions of domestic supply and price in the United States, however, give no reason to expect any increase in the small quantities now imported into this country. While prices in exporting countries are felt by producers to be very low, foreign mutton and lamb are not yet in a position to compete in the United States after paying the tariff of $2\frac{1}{2}$ cents and 4 cents per pound respectively.

Sheep have been increasing in Australia in recent years. An unofficial figure for January 1, 1926 puts the number at 90,000,000 head against 83,083,000 in 1925. In New South Wales, which supports almost 50 per cent of the sheep in Australia, another big lambing is expected. After shearing in September large numbers of sheep are expected at Homebush Fat Stock Market, and it is reported that the mutton exports are expected to be heavy. The receipts at this market for the first 3 months of 1926 amounting to 629,000 head compared with 383,000 head in the same period of 1925, an increase of almost 50 per cent, appear to bear out this statement.

LARGER WORLD MUTTON AND LAMB SUPPLIES, CONT'D.

In New Zealand the lamb crop was rated at 90 per cent of the ewes mated due to a fortunate change in the weather at lambing time. The figure for sheep and lambs for April 1926, therefore, will probably show an increase. The average for 1925 was 82.43 per cent. The last lambing season in Uruguay was reported by the American Minister to have greatly increased flocks. No report is available for Argentina. In England and Wales the number of lambs born this spring has been a good average. The number of sheep in most importing countries with the exception of Germany and Denmark has been increasing steadily since 1923.

In most countries for which slaughter data are available the figures show increased killings of sheep and lambs over the period 1923 to 1925. In the leading importing countries, 1925 figures indicate increases over 1924, and over prewar years in the case of Germany. In Argentina and the extreme southern provinces of Chile, however, the 1926 slaughter is expected to be under the heavy 1925 kill, according to the Review of the River Plate for April 26. Slaughterings of sheep and lambs in New Zealand in February numbered 1,333,000 carcases compared with 1,161,000 in 1925 an increase of 15 per cent. The quantity of frozen mutton and lamb in store and loaded but not departed on February 28 was 2,081,000 carcases compared with 1,565,000 at the same period of 1924 or an increase of 33 per cent, according to a report of the New Zealand Meat Producers Board. In Uruguay the slaughter of sheep has been especially heavy. The American Minister, U. Grant Smith, attributes this partly to the great increase in the flocks from the last lambing season and partly to the low prices for wool. Scant pasturage during January and February also caused many ranchers to market their sheep rather than risk a prolonged drought.

The best indications of meat production in exporting countries are the export figures. According to those figures, 1925 was a better mutton and lamb year than 1924 for New Zealand, Argentina and Australia, the principal exporting countries. In the United Kingdom, the world's greatest importer of frozen mutton and lamb, supplies in 1925 were larger than for any year since 1921, according to Weddel & Company's annual Review of the Frozen Meat Trade. Imports of frozen mutton and lamb amounted to 600,000,000 pounds as compared with 557,275,000 pounds in 1924, and the addition of fresh killed imports, canned mutton, etc., brings the total supply, according to Weddel, to 1,243,000,000 pounds in 1925, as compared with 1,181,000,000 pounds in 1924. Home grown supplies are estimated at 634 million pounds as compared with 609,000,000 pounds in 1924.

Argentine supplies in Great Britain were much larger in 1925 than in 1924, with some increase in imports from Australia. New Zealand furnished more mutton than in the preceding year but less lamb. Imports from Uruguay were much smaller in 1925 than in 1924. For the first three months of 1926 imports of lamb and mutton into the United Kingdom were larger than in the same months of 1925. As to origin of the 1926 imports, the situation was quite different from that of 1925. Imports from Argentina showed a very marked decline while there was an increase in receipts from Australia and large increases in imports from New Zealand and Uruguay.

LARGER WORLD MUTTON AND LAMB SUPPLIES, CONT'D.

SHEEP: Number in important mutton exporting countries

| Year | New Zealand April | Argentina Jan. c/ | Australia Jan. c/ | Uruguay April | Netherland. May-June | Canada June |
|---|---|---|---|---|---|---|
| | Thousands | Thousands | Thousands | Thousands | Thousands | Thousands |
| Pre-war a/ | b/ 23,996 | b/ 43,225 | 89,008 | b/e/26,286 | b/ 842 | 2,208 |
| 1923...... | 23,081 | b/ 36,209 | 78,803 | | f/ 668 | 2,754 |
| 1924...... | 23,776 | | 80,110 | b/ 14,445 | | 2,685 |
| 1925...... | 24,548 | | 83,083 | | | 2,756 |
| 1926...... | | | d/ 90,000 | | | |

a/ Average for five years immediately preceding war if available otherwise for any years within this period except as otherwise stated.
b/ Census.
c/ Countries reporting in December have been considered as of January of the year following.
d/ Estimate published in Country Life and Stock and Station Journal, March 12, 1926.
e/ Year 1908.
f/ Year 1921.

SHEEP: Number in important mutton importing countries, and the United States

| Year | United States January | United Kingdom June | France c/ Jan. | Belgium Jan.c/ | Germany Jan. c/ | Denmark July | Sweden June |
|---|---|---|---|---|---|---|---|
| | Thousands | Thousands | Thousands | Thousands | Thousands | Thousands | Thousands |
| Pre-war a/ | 51,929 | 29,241 | 16,176 | 189 | 4,988 | 533 | 1,205 |
| 1923...... | 37,223 | b/24,155 | 9,925 | | 5,566 | 374 | e/ 1,568 |
| 1924...... | 38,300 | b/25,042 | 10,172 | | d/6,105 | 302 | |
| 1925...... | 39,390 | b/26,407 | | | 5,735 | 265 | |
| 1926...... | 40,748 | | | | 4,742 | | |

a/ Average for 5 year period immediately preceding war, if available otherwise for any years within this period except as otherwise stated.
b/ Excludes Channel Islands where there were 179 sheep in 1922.
c/ Countries reporting as of December have been considered as of January of the following year.
d/ No census was made as of December 1923 which estimate would have been considered as of January 1924 as explained in note c/ so the figure for October 1923 has been used.
e/ Year 1920.

LARGER WORLD MUTTON AND LAMB SUPPLIES, CONT'D.

SHEEP AND LAMBS: Slaughterings in important mutton exporting countries a/

| Year | New Zealand c/ | Argentina: In freezing: salting and: preserved meat works | Argentina: Total | Australia total | Uruguay inspected | Canada farm and inspected |
|---|---|---|---|---|---|---|
| | Thousands | Thousands | Thousands | Thousands | Thousands | Thousands |
| Pre-war b/ ... | 7,088 | 3,003 | 4,977 | 14,289 | 638 | 938 |
| 1923 | 8,001 | 4,436 | 5,490 | 10,396 | 837 | 1,215 |
| 1924 | 8,278 | 4,429 | -- | -- | 757 | 1,188 |
| 1925 | -- | 4,938 | -- | -- | -- | d/ |
| First 2 months | | | | | | |
| 1925 | | 822 | -- | -- | 138 | ) |
| 1926 | | 448 | -- | -- | 418 | ) |

a/ The Netherlands has been omitted as no estimate of slaughterings of sheep and lambs is available. b/ Average for 5 years immediately preceding war wherever available. c/ For years ending March 31 of the following years. d/ Inspected slaughterings only in 1925 were 490,704 compared with 511,624 in 1924. For the first three months of 1926 the number of sheep slaughtered was 64,648 compared with 41,329 for the same period of 1925.

SHEEP AND LAMBS: Slaughterings in important mutton importing countries a/

| Year | United States: Inspected | United States: Total e/ | United Kingdom total | France Inspected f/ | Belgium inspected and farm | Germany inspected and farm |
|---|---|---|---|---|---|---|
| | Number | Number | Number | Number | Number | Number |
| Pre-war b/ .... | 13,231 | 17,069 | d/ 12,007 | g/ 5,819 | 266 | 2,422 |
| 1923 | 11,529 | 14,862 | e/ 9,662 | 3,866 | 120 | h/ 1,457 |
| 1924 | 11,991 | 15,441 | e/ 10,017 | 3,683 | 134 | 2,210 |
| 1925 | 12,001 | 15,454 | e/ 10,563 | 3,686 | --- | h/ 2,645 |
| First 2 months | | | | | | |
| 1925 | 1,845 | | | | | |
| 1926 | 2,027 | | | | | |

a/ Denmark and Sweden are excluded as there are no slaughter statistics available. b/ Average for 5 years immediately preceding war if available. c/ Estimated by Bureau of Animal Industry. d/ Average agricultural years 1909-10 to 1913-14. e/ Based on estimate of Weddel and Company in the Review of the Frozen Meat Trade 1925 that 40 per cent of the sheep are available for slaughter annually. f/ Average 1909-13 slaughterings in municipal slaughter houses in all France. Subsequent years based on Paris slaughterings which during the years 1909-13 averaged 34 per cent of the slaughterings in all municipal slaughter houses of France. g/ The number of sheep slaughtered in all France in 1911 including farm killings was estimated by J. C. Lucas, agronomic engineer in the Annales de la Science Agronomique Francaise et Etrangere at 8,520,000 while H. Martel, chief of the Veterinary Service of the Seine estimated them at 7,550,000. For the year 1911 the sheep slaughtering in municipal slaughter houses, i.e. 5,608,954 comprises about 66 per cent of all sheep slaughtered in France, according to J.E. Lucas' estimate and 74 per cent according to the estimate of H. Martel. h/ Farm production estimated.

## LARGER WORLD MUTTON AND LAMB SUPPLIES, CONT'D

MUTTON AND LAMB: Estimated production in important exporting countries a/

| Year | New Zealand inspected c/ | Argentina: In freezing: salting and: preserved meat works | Argentina: Total d/ | Australia total | Uruguay inspected d/ | Canada total |
|---|---|---|---|---|---|---|
| | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds |
| Pre-war b/ | 335 | 175 | 237 | | 32 | 62 |
| 1923 | 355 | 248 | 307 | | 47 | 79 |
| 1924 | 378 | 173 | | e/ 507 | 42 | 77 |
| 1925 | | 224 | | | | f/ |

a/ Netherlands has been omitted as data are not available. b/ Average for 5 years immediately preceding war wherever available. c/ For years ending March 31 of year following. d/ Estimated by multiplying slaughterings by average dressed weights at packing houses. e/ Average annual production for three years ending 1923-24. f/ Inspected slaughter in Canada in 1925 amounted to 490,704 sheep compared with 511,624 in 1924.

MUTTON AND LAMB: Production in important mutton importing countries a/

| Year | United States: Inspected | United States: Total c/ | United Kingdom total d/ | France inspected e/ | Belgium total | Germany total e/ |
|---|---|---|---|---|---|---|
| | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds |
| Pre-war b/ | 534 | 689 | 719 | 238 | 15 | 119 |
| 1923 | 446 | 571 | 506 | 170 | 5 | 71 |
| 1924 | 455 | 589 | 486 | 162 | 6 | 112 |
| 1925 | 467 | 599 | -- | 162 | -- | 139 |
| First 2 months | | | | | | |
| 1925 | 76 | | | | | |
| 1926 | 84 | | | | | |

a/ Denmark and Sweden are excluded as there are no data available of meat production. b/ Average for 5 years immediately preceding war wherever available. c/ Estimates of the Bureau of Animal Industry. d/ For Agricultural years ending May 31. e/ Estimated by multiplying slaughterings by average dressed weight.

LARGER WORLD MUTTON AND LAMB SUPPLIES, CONT'D.

AUSTRALIA: Exports of mutton and lamb carcases to the United Kingdom and other ports 1920-21 - 1924-25, first two months 1925-26

| Season July 1 to June 30 | To the United Kingdom | | | To other Ports | | | Total | | |
|---|---|---|---|---|---|---|---|---|---|
| | Mutton | Lamb | Total | Mutton | Lamb | Total | Mutton | Lamb | Total |
| | 1,000 carcases | 1,000 carcases | 1,000 carcases | 1,000 carcases | 1,000 carcases | 1,000 carcases | 1,000 carcases | 1,000 carcases | 1,000 carcases |
| 1920-21 | 603 | 657 | 1,260 | 138 | 26 | 164 | 741 | 683 | 1,424 |
| 1921-22 | 871 | 1,313 | 2,184 | 31 | 31 | 62 | 902 | 1,344 | 2,246 |
| 1922-23 | 1,856 | 2,716 | 4,572 | 77 | 41 | 118 | 1,933 | 2,757 | 4,690 |
| 1923-24 | 122 | 993 | 1,115 | 40 | 28 | 68 | 162 | 1,021 | 1,183 |
| 1924-25 | 173 | 1,172 | 1,345 | 49 | 25 | 74 | 222 | 1,197 | 1,419 |
| 1925 - | | | | | | | | | |
| July | -- | 1 | 1 | 5 | 2 | 7 | 5 | 3 | 8 |
| August | 1 | 1 | 2 | 6 | 2 | 8 | 7 | 3 | 10 |
| September | 29 | 23 | 52 | 4 | 4 | 8 | 33 | 27 | 60 |
| October | 124 | 532 | 656 | 3 | 5 | 8 | 127 | 537 | 664 |
| November | 70 | 518 | 588 | 6 | 5 | 11 | 76 | 523 | 599 |
| December | 98 | 341 | 439 | 15 | 1 | 16 | 113 | 342 | 455 |
| 1926 - | | | | | | | | | |
| January | 43 | 75 | 118 | 6 | 4 | 10 | 49 | 79 | 128 |
| February | 58 | 118 | 176 | 2 | 3 | 5 | 60 | 121 | 181 |
| Total July - Feb. | 423 | 1,609 | 2,032 | 47 | 27 | 74 | 470 | 1,635 | 2,105 |
| Same 8 months previous season | 163 | 1,068 | 1,231 | 39 | 19 | 58 | 202 | 1,087 | 1,289 |

Compiled from Pastoral Review, March and January 1926.

ARGENTINA: Exports of frozen mutton, 1913, 1922-1925

| Country | Year ending December 31 | | | | |
|---|---|---|---|---|---|
| | 1913 | 1922 | 1923 | 1924 | 1925 |
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| United Kingdom | 99,496 | 167,889 | 165,733 | 169,551 | 187,404 |
| France | 560 | 4,070 | 4,971 | 8,148 | 10,410 |
| United States | 540 | 6,863 | 1,069 | 1,290 | 157 |
| Other countries | 657 | 1,281 | 3,435 | 5,322 | 3,357 |
| Total | 101,253 | 180,103 | 175,208 | 184,311 | 201,328 |

Compiled from Anuario de la Direccion General de Estadistica, 1913, Anuario de Comercio Exterior de la Republica Argentina, 1923 and 1924, and Estadistica Agro-Pecuaria, December 1925.

LARGER WORLD MUTTON AND LAMB SUPPLIES, CONT'D

UNITED KINGDOM: Imports of mutton and lamb (fresh and frozen), by countries, January-March, 1924-1926

| Country from which imported | January-March 1924 | 1925 | 1926 |
|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| New Zealand | 48,682 | 53,418 | 60,000 |
| Argentina | 54,200 | 55,062 | 35.708 |
| Australia | 26,824 | 21,981 | 34,997 |
| Uruguay | 13,582 | 7,577 | 14,600 |
| Netherlands | 1,445 | 3,125 | 1,513 |
| Other countries | 4,542 | 7,841 | 2,553 |
| Total | 149,275 | 149,004 | 149,391 |

Compiled from Accounts Relating to the Trade and Navigation of the United Kingdom, March, 1926.

UNITED KINGDOM: Imports of mutton and lamb, fresh and frozen, by countries, 1913, 1922-1925

| Country from which imported | Year ending December 31 1913 | 1922 | 1923 | 1924 | 1925 |
|---|---|---|---|---|---|
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| Fresh: | | | | | |
| Netherlands | 13,781 | 15,530 | 12,331 | 13,260 | 13,456 |
| Other countries | 335 | 211 | 371 | 332 | 525 |
| Total | 14,116 | 15,741 | 12,702 | 13,592 | 13,981 |
| Frozen: | | | | | |
| New Zealand | 246,459 | 337,799 | 256,107 | 269,162 | 280,280 |
| Australia | 186,576 | 110,220 | 142,448 | 50,677 | 59,078 |
| Argentina | 113,383 | 160,191 | 195,406 | 177,078 | 206,254 |
| Uruguay | 18,478 | 13,051 | 23,403 | 25,914 | 13,274 |
| Chile | a/ | 15,288 | 24,252 | 26,701 | a/ |
| United States | a/ | 269 | 244 | 13 | a/ |
| China | a/ | --- | 1,279 | 5,691 | a/ |
| Other countries | 17,981 | 2,502 | 1,013 | 2,039 | 41,479 |
| Total | 582,877 | 639,320 | 644,152 | 557,275 | 600,365 |
| Total mutton and lamb, fresh and frozen | 596,993 | 655,061 | 656,854 | 570,867 | 614,346 |
| Reexports, mutton and lamb | -- | 6,564 | 4,571 | 5,078 | 2,566 |
| Net imports, mutton and lamb | 596,993 | 648,497 | 652,283 | 565,789 | 611,780 |

Compiled from Annual Statement of the Trade of the United Kingdom, 1924, and Trade and Navigation of the United Kingdom, December 1913 and 1925.

a/ If any, included in other countries.

LARGER WORLD MUTTON AND LAMB SUPPLIES, CONT'D.

MUTTON: International trade, average 1911-1913, annual 1924-1925

| Country | Average 1911-1913 Imports | Average 1911-1913 Exports | 1924 Imports | 1924 Exports | 1925 preliminary Imports | 1925 preliminary Exports |
|---|---|---|---|---|---|---|
| | Year ending December 31 | | | | | |
| Principal exporting countries | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| Argentina | -- | 148,457 | -- | 184,311 | -- | 201,328 |
| Australia | 7 | 149,958 | -- | a/49,291 | -- | a/ b/59,869 |
| Canada | 4,717 | 48 | 1,367 | 922 | 1,321 | 2,641 |
| Netherlands | 76 | 17,212 | 1,347 | 17,566 | 1,067 | 17,081 |
| New Zealand | -- | 235,509 | -- | 278,426 | -- | 291,039 |
| Union of South Africa | 1,914 | 75 | 46 | 176 | -- | -- |
| Uruguay | -- | 3,262 | -- | 34,417 | -- | b/13,938 |
| Principal importing countries | | | | | | |
| Belgium | c/ | c/ | 2,976 | 1,829 | 2,905 | 829 |
| Denmark | 3,828 | 344 | 1,106 | 61 | 629 | 35 |
| France | 930 | 334 | 24,475 | 251 | 22,741 | 172 |
| Germany | 1,046 | 350 | 3,156 | 711 | 2,002 | 2,122 |
| Hongkong | -- | -- | 502 | 3 | -- | -- |
| Sweden | 1,218 | 100 | 651 | 105 | -- | -- |
| United Kingdom | 596,899 | -- | 577,176 | -- | 624,365 | -- |
| United States | 185 | 4,146 | 2,166 | 1,445 | 2,770 | 1,464 |
| Other countries | 924 | 489 | 7,071 | 201 | 97 | 632 |
| Total | 611,744 | 560,284 | 622,039 | 569,715 | 657,897 | 591,150 |

Compiled from official sources.

a/ Year beginning July 1. b/ Six months. c/ Not separately stated.

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## SHEEP INDUSTRY IN NEW ZEALAND

In 1858 sheep in New Zealand numbered only 1,523,000 and in 1925 had increased to 24,548,000. The largest number, 26,538,000 was reported in 1918; the smallest number in recent years, i.e. since 1910, was 22,222,000 in 1922. A table showing lambings for the years 1921-25 appears on page 795 . New Zealand is an ideal sheep country with a uniform climate which provides good pasture all the year around. This condition has been an important factor in making this country the world's most important mutton and lamb producer and the greatest exporter of those products as well as an important producer of crossbred wool.

### Breeds

Sheep first appeared in New Zealand in 1840. Until the commencement of the frozen meat industry in 1882 the production of wool, as in Australia, was the principal object of the sheep farmer. In North Island, with its rich pastures the Lincoln and Romney Marsh breeds were most used but in South Island Merinos predominated. Since 1882 the frozen meat trade has so revolutionized the sheep industry that in April 1925 there were only 1,005,451 Merinos out of 24,548,000 sheep.

The Merino ewe furnished the foundation of the crossbred stock which has made Canterbury mutton famous on the British market. In the early days the Merino ewe was crossed with the original type of English Leicester. Of later years the

SHEEP INDUSTRY IN NEW ZEALAND, CONT'D.

Lincoln has been used to cross with the Merino and black faced rams have been employed further with the cross-bred ewes. Systematic inbreeding of Merino longwool half-bred sheep produced the well-known Corriedale breed. In the North Island the Romney sheep is the most popular sheep and it is also increasing in numbers in South Island. The Lincoln and Border Leicester are also favored in both Islands while the Southdown is taking the lead for fat lamb production throughout the Dominion.

## Size of flocks

There is a tendency to decrease the size of flocks in New Zealand as in Australia. In 1886 there were 166 flocks having 20,000 sheep or more while in 1925 there were only 22 such flocks. In 1925 there were 11,953 flocks of under 500 sheep while in 1886 there were only 6,024 flocks of this kind. The average size of flock was 1,659 sheep in 1886 and 1,017 in 1925. See page 794.

## Stock yards

Stock sales are held in yards, owned by large stock agency companies, or by local sale-yard companies and the sales are made by auction. None of the stock yards are owned by the government. In recent years a few municipal stock yards have been established and numerous farmers' cooperative companies own yards. All buy and sell more or less stock for clients, arrange credit, etc. Stock for freezing is bought from the farmers by buyers of large meat companies. Some of the companies purchase livestock for slaughtering and freezing on their own account, in addition to slaughtering and freezing on clients' account.

## Slaughtering

The principal sheep killing months in New Zealand are from September to June in the North Island and from December to August in the South Island. Under the Slaughtering and Inspection Act of 1908, the government has provided for the inspection of all slaughterings in municipalities of more than 2,000 inhabitants and for export. The largest municipal slaughter houses in the Dominion are those at Auckland and Dunedin. No meat for local consumption is allowed to be killed except in the local municipal abattoir, the only exception being in respect to pigs killed by farmers on their own farms and sold in carcase. In districts where no established registered abattoirs exist the Slaughtering and Inspection Act of 1918 provides for the slaughtering of stock for human consumption in specially registered slaughter houses. The conditions applying to slaughterings for home consumption also apply to export slaughter houses. No slaughtering and packing plants established for the purpose of slaughtering and freezing meat for export are owned in New Zealand by the government. Several export freezing works, however, are owned by co-operative companies.

## Frozen meat production

When the frozen meat trade was first seriously considered in 1882, there was much doubt that the colony could soon find 1,000,000 sheep per annum for

SHEEP INDUSTRY IN NEW ZEALAND, CONT'D.

freezing without impairing the breeding flocks. In 1886 the meat freezing establishments produced only 463,614 mutton and lamb carcases. In 1897, however, nearly 1,750,000 sheep and over 1,000,000 lambs were exported from New Zealand. By 1898 there were 21 freezing works with a full freezing capacity of 3,665,000 sheep annually. In 1925 the number slaughtered was 8,278,000. New Zealand now has 41 freezing works with a combined killing and freezing capacity of 4,220 cattle and 144,000 sheep per day and capable of storing over 200,000 short tons of meat. During the 1924-25 season four of these freezing works were closed down. The number of sheep slaughtered, meat produced and exported is given in the table on page 795.

## Frozen meat marketing

Under the Meat Export Control Act, 1921-22, there was formed a Meat Producers Board consisting of eight members. Five members represent producers of meat for export, two are appointed by the government, and one represents stock and station agents. The object of the Board is to control the export of meat in the interest of the producer. Matters which have received attention have been marketing of parcels, grading of meat, loading and discharging frozen produce, regulation of shipments, freights (rail and sea) freezing charges, etc.

The Board publishes regular reports on prices, statistics of killings, shipments and stocks and other information all of which is regularly requested by farmers and those engaged in the marketing of frozen meat. An article by the chairman of the Meat Board on markets abroad states that beyond question the Southdown crossed lamb is the type most eagerly sought after in the English market and for which the butcher is prepared to pay the highest price per pound.

Imports of frozen mutton and lamb carcases into the United Kingdom from New Zealand increased from 8,839 in 1882 to 10,316,245 in 1921. From 1922 to 1925 the average imports have been 6,818,000. For the first two months of 1926 average imports have been 6,818,000. For the first two months of 1926 shipments of mutton and lamb amounted to 1,398,436 carcases compared with 1,483,409 in 1925 or a decrease of 6 per cent reports the Pastoral Review of Australia for March 16, 1926 while the amount in store and loaded but not departed as of February 28, 1926 was 2,080,584 compared with 1,564,857 carcases at the same time in 1925.

## Prices of mutton and lamb

Since February 1926 very best quality New Zealand mutton, medium to light weight has been realizing only 12 to 13 cents per pound on the London market. Heavier weights sold down to 11 cents while ewe mutton is worth only 8 to 9 cents and in some cases still lower. Lamb brings about 18 cents per pound. Consequently schedule prices at the various freezing works throughout New Zealand have been steadily reduced from time to time and now range from 12 cents per lb. down to 9 cents according to weight and quality, with

SHEEP INDUSTRY IN NEW ZEALAND, CONT'D.

still lower prices being paid for ewes. Reports from London of the success of Argentine chilled meat are causing the New Zealand meat industry to discuss the problem of improving the methods of defrosting the New Zealand product, which, because of the distance to the London market, cannot be shipped in a chilled state but must be shipped frozen.

## Wool production and exports

As in Australia, there are several different estimates of the annual wool production in New Zealand. One is that obtained by taking exports from 12 months immediately preceding the commencement of shearing plus the quantity used in local manufactures. In this estimate no addition has been made for wool on sheep skins exported or for loss in scouring and washing. The successive years are not always comparable as wool may be held from one year to another for export. Another estimate is that of shearing by farmers. This only covers production from sheep shorn on the farms, no estimate being included of wool obtained by freezing companies from the sheep consigned to them from slaughter. According to the estimate of Dalgety and Company which appears to be the most accurate one of production, the amount produced in 1908-09 was 174,574,000 pounds and in 1924-25, 209,269,000 pounds. It is estimated that the production for 1925-26 was 188,000,000 or slightly more. Tables showing these three estimates appear on page 799. In the early days practically all the wool was Merino. In 1908-09 the proportion of wool from crossbred and all strong wool breeds constituted 95 per cent of all wool sold in New Zealand and in 1924-25 98 per cent. See table, page 800.

## Wool marketing

Shearing commences in September and continues until January. Wool auction sales are arranged for each year at the different centers. The sales take place from November to March. Since practically the whole clip is sold locally, the season is believed by buyers and brokers to be too cramped and it is suggested that it be lengthened over a reasonable period as in Australia and in London.

The preparation of the 1924-25 clip for marketing as concerns classification and general appearance showed evidence of a steady progress in the average condition of market offerings, according to Dalgety and Company's Annual Review. Classing by growers has increased so that offerings are much more uniform than previously. Some mistakes noticed in the growers classing were the mixing of sound with tender wools and unevenness in the length of staple, but except with the larger clips this is to some extent unavoidable.

## Bibliography

1. New Zealand Yearbooks
2. Third Annual Report and statement of Accounts of the New Zealand Meat Producers Board.
3. Weddel's Annual Review of the Frozen Meat Trade.
4. Dalgety and Company annual Review, 1925.
5. Material in the files of the Division of Livestock and Meat, and Division of Statistical and Historical Research, Bureau of Agricultural Economics.

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SHEEP INDUSTRY IN NEW ZEALAND, CONT'D

NEW ZEALAND: Number of sheep 1859 to 1925

| Year | Number | Year | Number |
|---|---|---|---|
| 1858 * | 1,523,000 | 1906-07 | 20,108,000 |
| 1861 * | 2,761,000 | 1907-08 | 20,984,000 |
| 1864 * | 4,937,000 | 1908-09 | 22,449,000 |
| 1867 * | 8,419,000 | 1909 | 23,481,000 |
| 1871 * | 9,701,000 | 1910 | 24,270,000 |
| 1874 * | 11,705,000 | April, 1911 | 23,996,000 |
| 1878 * | 13,069,000 | 1912 | 23,750,000 |
| 1881 * | 12,190,000 | 1913 | 24,192,000 |
| 1886 * | 15,174,000 | 1914 | 24,799,000 |
| 1891 * | 16,754,000 | 1915 | 24,901,000 |
| 1895-96 | 19,827,000 | 1916 | 24,788,000 |
| 1896-97 | 19,138,000 | 1917 | 25,270,000 |
| 1897-98 | 19,688,000 | 1918 | 26,538,000 |
| 1898-99 | 19,674,000 | 1919 | 25,829,000 |
| 1899-00 | 19,349,000 | 1920 | 23,920,000 |
| 1900-01 | 19,355,000 | 1921 | 23,285,000 |
| 1901-02 | 20,233,000 | 1922 | 22,222,000 |
| 1902-03 | 20,343,000 | 1923 | 23,081,000 |
| 1903-04 | 18,955,000 | 1924 | 23,776,000 |
| 1904-05 | 18,281,000 | 1925 | 24,548,000 |
| 1905-06 | 19,131,000 | | |

Official Yearbook of New Zealand.
* Census.

NEW ZEALAND: Number and size of flocks 1886, 1896, 1906, 1916 and 1921

<table>
<tr><th>Size of flocks</th><th>1886</th><th>1896</th><th>1906</th><th>1916</th><th>1925</th></tr>
<tr><td></td><td>Number</td><td>Number</td><td>Number</td><td>Number</td><td>Number</td></tr>
<tr><td>Under 500</td><td>6,024</td><td>12,028</td><td>11,793</td><td>11,818</td><td>11,953</td></tr>
<tr><td>500 and under 1,000</td><td>1,189</td><td>2,605</td><td>3,431</td><td>4,911</td><td>5,461</td></tr>
<tr><td>1,000 " " 2,000</td><td>747</td><td>1,460</td><td rowspan="2">3,340</td><td rowspan="2">5,643</td><td rowspan="2">6,036</td></tr>
<tr><td>2,000 " " 5,000</td><td>532</td><td>892</td></tr>
<tr><td>5,000 " " 10,000</td><td>263</td><td>340</td><td>394</td><td>566</td><td>536</td></tr>
<tr><td>10,000 " " 20,000</td><td>228</td><td>231</td><td>213</td><td>202</td><td>138</td></tr>
<tr><td>20,000 and upwards</td><td>166</td><td>147</td><td>94</td><td>41</td><td>22</td></tr>
<tr><td>Total (all flocks)</td><td>9,149</td><td>17,703</td><td>19,265</td><td>23,181</td><td>24,146</td></tr>
</table>

Official Yearbook of New Zealand, 1910, page 501, 1920, page 228, 1926, page 432.

a/ As there is a discrepancy between these figures and the enumeration of the total number of sheep in the Dominion including lambs as of April 30, there are apparently some sheep not classified into flocks.

SHEEP INDUSTRY IN NEW ZEALAND, CONT'D.

NEW ZEALAND: Lambing returns during five years, 1921 to 1925

| Year | Number of breeding ewes | Estimated average percentage of lambing | Estimated number of lambs | Actual number of lambs tailed |
|---|---|---|---|---|
| 1921 | 12,147,788 | 86.59 | 10,518,780 | 10,267,910 |
| 1922 | 12,496,054 | 86.77 | 10,843,005 | 10,895,521 |
| 1923 | 13,063,003 | 88.02 | 11,498,456 | 11,133,336 |
| 1924 | 13,076,094 | 86.14 | 11,258,030 | 11,467,147 |
| 1925 | 13,715,223 | 82.43 | 11,305,858 | |

Abstract of Statistics, December 24, 1925.

NEW ZEALAND: Slaughter of sheep and lambs, mutton and lamb production and export

| Year ending March 31 | Sheep and lambs slaughtered | Mutton and lamb produced | Mutton and lamb exported a/ |
|---|---|---|---|
| | Number | 1,000 pounds | 1,000 pounds |
| 1904 | 5,532,485 | 277,885 | 207,654 |
| 1905 | 5,286,832 | 262,378 | 175,741 |
| 1906 | 4,268,698 | 207,117 | 156,009 |
| 1907 | 4,442,117 | 204,327 | 207,380 |
| 1908 | 5,724,719 | 269,820 | 195,279 |
| 1909 | 6,162,671 | 289,787 | 201,655 |
| 1910 | 6,469,554 | 299,957 | 216,437 |
| 1911 | 6,417,103 | 348,047 | 250,528 |
| 1912 | 6,381,635 | 306,287 | 206,725 |
| 1913 | 6,812,574 | 324,611 | 223,310 |
| 1914 | 8,358,011 | 397,374 | 275,360 |
| 1915 | 8,471,321 | 418,542 | 264,889 |
| 1916 | 8,109,663 | 388,394 | 296,977 |
| 1917 | 7,033,227 | 339,627 | 231,534 |
| 1918 | 6,326,787 | 314,917 | 194,996 |
| 1919 | 7,331,321 | 369,072 | 107,358 |
| 1920 | 8,793,083 | 448,851 | 354,818 |
| 1921 | 8,179,490 | 406,980 | 457,261 |
| 1922 | 9,212,495 | 433,486 | 361,589 |
| 1923 | 7,459,371 | 338,463 | 330,264 |
| 1924 | 8,000,893 | 354,609 | 273,150 |
| 1925 | 8,277,673 | 378,499 | 268,232 |

Official Yearbooks of New Zealand.
a/ In some instances the exports appear to exceed production. This is because most of slaughtering is done in the March quarter and some of the meat is kept in the freezing establishments and exported in the following season.

SHEEP INDUSTRY IN NEW ZEALAND, CONT'D.

NEW ZEALAND: Weight of mutton and wool crossbred sheep

| Mutton and wool | At 6 months | At 12 months | At 24 months | At 36 months |
|---|---|---|---|---|
| | Pounds | Pounds | Pounds | Pounds |
| **Leicester and Merino crossbred** | | | | |
| 1. Wethers - | | | | |
| Carcase (when dressed) | 40 | 52 | 60 | 65 |
| Fleece | 3 | 8-1/2 | 8 | 8 |
| 2. Fat ewes, maiden - | | | | |
| Carcase | 40 | 52 | 60 | 60 |
| Fleece | 3 | 8-1/2 | 8 | 8 |
| **Lincoln and Merino crossbred** | | | | |
| 1. Wethers - | | | | |
| Carcase (dressed) | 40 | 60 | 70 | 75 |
| Fleece | 3 | 9-1/2 | 8 | 8 |
| 2. Fat ewes, maiden - | | | | |
| Carcase | 40 | 60 | 65 | 70 |
| Fleece | 3 | 9-1/2 | 8 | 8 |
| **Hampshire Down and Merino crossbred** | | | | |
| 1. Wethers - | | | | |
| Carcase (dressed) | 45 | 65-1/2 | 75 | 80 |
| Fleece | 2-1/2 | 7 | 7 | 7 |
| 2. Fat ewes, maiden - | | | | |
| Carcase (dressed) | 45 | 65 | 70 | 75 |
| Fleece | 2-1/2 | 7-1/2 | 7 | 7 |
| **Romney Marsh and Merino crossbred** | | | | |
| 1. Wethers - | | | | |
| Carcase (dressed) | 40 | 60 | 70 | 75 |
| Fleece | 3 | 8-1/2 | 7-1/2 | 7-1/2 |
| 2. Fat ewes, maiden - | | | | |
| Carcase | 40 | 60 | 70 | 70 |
| Fleece | 3 | 8-1/2 | 7-1/2 | 7-1/2 |
| **Southdown and Merino crossbred** | | | | |
| 1. Wethers - | | | | |
| Carcase (dressed) | 35 | 60 | 75 | 85 |
| Fleece | 2 | 7 | 7 | 7 |
| 2. Fat ewes, maiden - | | | | |
| Carcase | 35 | 60 | 75 | 85 |
| Fleece | 2 | 7 | 7 | 7 |

Inquiry made by W. A. Benn, Manager of Australian Chilling and Freezing Company. Australiasian Pastoral Review, February 15, 1892, page 484.

SHEEP INDUSTRY IN NEW ZEALAND, CONT'D.

NEW ZEALAND: Mutton and lamb slaughtered, loaded and in store, February 1926 and 1925

| Classification | Slaughtering in February | | In store and loaded but not departed, February 28 | |
|---|---|---|---|---|
| | 1925 | 1926 | 1925 | 1926 |
| | Carcases | Carcases | Carcases | Carcases |
| Lamb | 707,549 | 923,535 | 909,038 | 1,497,548 |
| Mutton wether / Ewe mutton | 453,161 | 409,203 | 655,819 | 533,036 |
| Total | 1,160,710 | 1,332,738 | 1,564,857 | 2,080,584 |

Report of New Zealand Meat Producers Board published in Cold Storage March 18, 1926, page 112.

NEW ZEALAND: Monthly shipments of mutton and lamb to the United Kingdom 1925 and first 2 months of 1926

| Month and year | Exports to the United Kingdom | | |
|---|---|---|---|
| | Mutton | Lamb | Total mutton and lamb |
| | Carcases | Carcases | Carcases |
| 1925 | | | |
| January | 115,677 | 372,822 | 488,499 |
| February | 312,519 | 682,391 | 994,910 |
| March | 222,266 | 320,787 | 543,053 |
| April | 240,341 | 830,765 | 1,071,106 |
| May | 241,070 | 870,710 | 1,111,780 |
| June | 172,261 | 447,578 | 619,839 |
| July | 164,113 | 327,847 | 491,960 |
| August | 235,672 | 210,604 | 446,276 |
| September a/ | | | |
| October | 151,183 | 127,537 | 278,720 |
| November | 319,592 | 123,740 | 443,332 |
| December | 142,368 | 94,890 | 237,258 |
| Total 1925 | 2,317,062 | 4,409,671 | 6,726,733 |
| 1926 | | | |
| January | 145,983 | 398,820 | 544,803 |
| February | 265,133 | 588,500 | 853,633 |
| First 2 months | | | |
| 1925 | 428,196 | 1,055,213 | 1,483,409 |
| 1926 | 411,116 | 987,320 | 1,398,436 |

Pastoral Review of Australia, March 16, 1926.

a/ Owing to seamen's strike no clearances reported.

SHEEP INDUSTRY IN NEW ZEALAND, CONT'D

NEW ZEALAND: Exports of mutton and lamb, frozen, by countries, 1913, 1922-1925

| Country to which exported | Year ending December 31 | | | | |
|---|---|---|---|---|---|
| | 1913 | 1922 | 1923 | 1924 | 1925 |
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| United Kingdom...... | 245,951 | 330,014 | 249,797 | 277,825 | |
| Gibraltar........... | 279 | --- | -- | -- | |
| Canada.............. | 120 | 333 | -- | 75 | |
| Hawaii.............. | -- | 292 | 97 | 401 | |
| Other countries..... | 13 | 649 | 60 | 125 | |
| Total....... | 246,363 | 331,288 | 249,954 | 278,426 | 291,039 |

Compiled from Trade and Shipping in the Dominion of New Zealand 1913, 1922-1924 and Monthly Abstract of Statistics, January 1926.

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NEW ZEALAND: Exports of wool ten year average 1862 to 1922 - calendar years 1923, 1924 and 1925

| Ten year average ending | Pounds |
|---|---|
| 1862............................. | 4,257,000 |
| 1872............................. | 27,178,000 |
| 1882............................. | 58,021,000 |
| 1892............................. | 92,811,000 |
| 1902............................. | 137,652,000 |
| 1912............................. | 168,007,000 |
| 1922............................. | 199,290,000 |
| 1923............................. | 217,566,091 |
| 1924............................. | 206,189,911 |
| 1925............................. | a/ |

Source: Statistical Report on Prices for 1923, page 186. Official Yearbook 1926.

a/ Exports during calendar year ending December 31, 1925 were 596,895 bales compared with 593,027 in 1924. Assuming an average bale to weigh the same as in 1925 the exports would amount to 207,719,000 pounds.

SHEEP INDUSTRY IN NEW ZEALAND, CONT'D.

NEW ZEALAND: Three different estimates of wool production in the grease, during seasons ending September 30, 1895-1925.

| Year ending September 30. | Production estimated by adding exports and amount consumed locally. a/ | | | Estimated amount of wool obtained from shearing on farms exclusively b/ | Estimate of total production by Dalgety and Company |
|---|---|---|---|---|---|
| | Exports | Local cons. | Est. Total production | | |
| | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| 1895 ..... | 129,334 | 3,299 | 132,633 | | |
| 1896 ..... | 128,310 | 3,990 | 132,300 | | |
| 1897 ..... | 134,411 | 3,298 | 137,709 | | |
| 1898 ..... | 150,401 | 3,764 | 154,165 | | |
| 1899 ..... | 143,644 | 4,259 | 147,903 | | |
| 1900 ..... | 144,830 | 3,223 | 148,053 | | |
| 1901 ..... | 143,065 | 4,630 | 147,695 | | |
| 1902 ..... | 155,653 | 4,203 | 159,856 | | |
| 1903 ..... | 160,920 | 5,294 | 166,214 | | |
| 1904 ..... | 141,032 | 5,191 | 146,223 | | |
| 1905 ..... | 146,890 | 3,651 | 150,541 | | |
| 1906 ..... | 152,765 | 4,373 | 157,138 | | |
| 1907 ..... | 164,006 | 4,117 | 168,123 | | |
| 1908 ..... | 163,931 | 4,779 | 168,710 | | |
| 1909 ..... | 187,619 | 5,203 | 192,822 | | 174,574 |
| 1910 ..... | 194,473 | 5,642 | 200,115 | | 184,216 |
| 1911 ..... | 184,854 | 6,048 | 190,902 | | 173,174 |
| 1912 ..... | 189,554 | 6,284 | 195,838 | | 177,849 |
| 1913 ..... | 195,353 | 6,824 | 202,177 | | 169,844 |
| Average .. 1909-13 .. | | | 196,371 | | 194,628 |
| 1914 ..... | 196,500 | 6,847 | 203,347 | | 197,267 |
| 1915 ..... | 208,908 | 6,628 | 215,536 | | 181,283 |
| 1916 ..... | 200,119 | 8,772 | 208,891 | | 193,830 |
| 1917 ..... | 162,044 | 7,590 | 169,634 | 178,793 | 209,841 |
| 1918 ..... | 110,054 | 7,489 | 117,543 | 181,238 | 227,521 |
| 1919 ..... | 258,364 | 6,720 | 265,084 | 183,563 | 204,965 |
| 1920 ..... | 165,822 | 8,599 | 174,421 | 172,808 | 181,480 |
| 1921 ..... | 174,950 | 5,308 | 180,258 | 169,101 | 191,614 |
| 1922 ..... | 325,257 | 8,483 | 333,740 | 159,831 | 214,706 |
| 1923 ..... | 214,845 | 9,171 | 224,016 | 162,739 | 208,979 |
| 1924 ..... | 210,583 | 7,786 | 218,369 | 165,914 | 208,269 |
| 1925 ..... | 195,395 | 5,141 | 200,536 | 185,031 | 188,000 |
| 1926 ..... | | | | | |

Official Yearbook of New Zealand and Dalgety and Company's Annual Review, 1915, 1922, 1923, 1926.

a/ Approximate annual production taking exports for 12 months immediately preceding the commencement of shearing plus the quantity used in local manufactures. No addition has been made for wool on sheep skins exported nor for loss in scouring and washing.

b/ Covers only production from sheep shorn by farmers. No estimate included of wool obtained by freezing companies.

## SHEEP INDUSTRY IN NEW ZEALAND, CONT'D.

NEW ZEALAND: Percentage of merino and crossbred wool sold in New Zealand seasons 1908-09, 1913-14, 1920-21 to 1924-25.

| Season | Merino | Per cent of total | Crossbred | Per cent of total | Total | Per cent |
|---|---|---|---|---|---|---|
| | Bales | | Bales | | Bales | |
| 1908-09 | 10,079 | 5 | 197,910 | 95 | 207,989 | 100 |
| 1913-14 | 5,487 | 2 | 259,347 | 98 | 264,834 | 100 |
| 1920-21 | 7,062 | 4 | 191,579 | 96 | 198,641 | 100 |
| 1921-22 | 12,414 | 3 | 454,967 | 97 | 467,381 | 100 |
| 1922-23 | 9,690 | 2 | 467,276 | 98 | 476,966 | 100 |
| 1923-24 | 12,232 | 2 | 491.664 | 98 | 503,896 | 100 |
| 1924-25 | 7,030 | 2 | 455,765 | 98 | 462,795 | 100 |

Annual Review, Dalgety and Company.

NEW ZEALDNS: Destination of purchases of New Zealand wool.a/

| Destination | Season | | | | | | |
|---|---|---|---|---|---|---|---|
| | 1907-08 | 1913-14 | 1920121 | 1921-22 | 1922-23 | 1923-24 | 1924-25 |
| | Bales | Bales | Bales | Bales | Bales | Bales | Bales |
| United Kingdom | 107,700 | 118,889 | 115,413 | 337,034 | 289,957 | 228,972 | 237,143 |
| France | | | 24,414 | 8,667 | 11,080 | 24,203 | 18,443 |
| Belgium and Holland | | | | 600 | 5,148 | 12,468 | 9,620 |
| Germany and Austria | | 98,984 | c/3,488 | c/25,619 | c/45,619 | 106,190 | c/65,476 |
| Italy and Switzerland | b/ 5,050 | | b/6,975 | b/2,884 | b/5,863 | 12,468 | 8,504 |
| United States and Canada | 250 | 24,931 | 29,521 | 50,222 | 51,733 | 21,818 | 32,620 |
| Japan, China and India | | | | 10,863 | 14,857 | 9,351 | 12,729 |
| Local manufacturers | 19,349 | 22,030 | 18,830 | 31,487 | 52,709 | 88,426 | 78,260 |
| Total | 132,349 | 264,834 | 198,641 | 467,381 | 476,966 | 503,896 | 462,795 |

Compiled from Annual Reviews of Dalgety and Company.

a/ Information furnished by buyers.

b/ Includes Austria.

c/ Germany only.

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## THE FRENCH WOOL INDUSTRY

France ranks second to the United Kingdom as a wool importer and is exceeded only by the United States and by the United Kingdom as a wool manufacturer. The domestic production of wool in France averages about 42,000,000 pounds annually. This is only about 8 per cent of the actual annual requirements of the domestic wool textile industry. The balance has to be imported, principally from Australia, Argentina and Uruguay, Great Britain and South Africa.

Imports of raw wool into France, including wooled sheep skins, averaged 521,379,000 pounds annually during the four years 1921-24, while domestic production of wool averaged 42,124,000 pounds annually. The aggregate of exports of domestic wool and re-exports of foreign wool during this period averaged 40,818,000 annually. This left an average annual balance of 522,685,000 pounds of raw wool for manufacturing purposes.

### Production of wool in France

The most generally accepted estimates for the domestic production of wool in France are those made by the "Office Francais de l'Elevage" (Bureau of French Livestock Breeding). This organization bases its estimates on the application of an average yield of wool to the number of each breed of sheep in France. By the use of this basis the French wool clip for 1922 was estimated at 41,800,000 pounds. The total number of sheep in France that year, according to the French Ministry of Agriculture, was 9,782,420 head, which indicates that an average yield of 4.3 pounds a/ per sheep was used in estimating production. No estimates have been made since 1922 but since the proportional representation of rams, ewes, lambs, etc., has not changed materially the average wool yield of 4.3 pounds per sheep can be considered as still applicable. The official census of sheep in France at the end of 1924 places the total at 10,171,520 head which, at 4.3 pounds per sheep, would represent a total domestic clip of approximately 43,400,000 pounds.

### Wool retained for consumption in France

Recent postwar years show substantial increases in the quantities of wool retained for consumption in France. Although incomplete, it is felt that imports plus production less exports and re-exports give some indication of the rate of variation in the manufacture of wool products in France. Such figures for the four year period 1921-24 indicate that variations in the quantities of wool retained in France for consumption are due more to import variations than to fluctuations in domestic production or exports.

The bulk of the raw wool imported into France comes from Australia, Argentina and Uruguay, Great Britain, South Africa and the French possessions in northern Africa, i.e., from Algeria, Tunisia and Morocco. Total imports during 1925 amounted to approximately 537,000,000 pounds as compared

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a/ The actual figure used by this Bureau was 1.936 kilograms which is equal to 4.268 pounds per capita.

THE FRENCH WOOL INDUSTRY, CONT'D

with 492,000,000 in 1924 and with the prewar average for 1909-13 of 600,000,000 pounds. Australia supplies about 40 per cent of the total, Argentina and Uruguay combined about 23 per cent, Great Britain about 11 per cent, South Africa about 8 per cent and northern Africa about 7 per cent. In addition, France imports about 1,400,000 pounds of semimanufactured wool (combed and carded) annually. Most of this comes from Great Britain. Imports of wool waste in 1925 amounted to approximately 20,000,000 pounds, coming principally from the economic union of Belgium and Luxembourg and from Germany, Great Britain and Italy.

FRANCE: Raw wool retained for consumption, 1921-24.

| Movement | 1921 | 1922 | 1923 | 1924 | Average 1921-24 |
|---|---|---|---|---|---|
| | Pounds | Pounds | Pounds | Pounds | Pounds |
| Imports a/ .... | 335,516,751 | 680,572,586 | 577,490,120 | 491,935,767 | 521,378,806 |
| Production b/ .. | 40,970,922 | 41,751,369 | 42,361,223 | 43,412,047 | 42,123,890 |
| Available supply c/ | 376,487,673 | 722,323,955 | 619,851,343 | 535,347,814 | 563,502,696 |
| Exports and re-exports a/ . | 33,074,952 | 47,112,302 | 45,593,994 | 37,491,207 | 40,818,114 |
| Consumption ..... | 343,412,721 | 675,211,653 | 574,257,349 | 497,856,607 | 522,684,582 |

a/ Official statistics of the French Customs Office. b/ Based on an average yield of 4.3 pounds of wool per capita for the number of sheep reported by the French Ministry of Agriculture. c/ Including all stocks.

## Colonial sources of supply to be developed

The number of sheep in France has decreased from 33,000,000 in 1852 to 22,000,000 in 1890, to 16,000,000 in 1913 and to 10,000,000 at the end of 1924. The wool manufacturing equipment of the country and the demand for wool textiles, however, have been steadily increasing until today France is one of the most important wool consuming nations of the world. The country, consequently, has been obliged to import a constantly increasing quantity of raw material. In order to insure an adequate supply of raw wool for the increasing manufacturing capacity of the nation and to guard against the possibility of restrictions on the French access to foreign sources of supply, the French interests are encouraging the production of wool in the French colonies.

French sheep raisers, up to the world war at least, were principally interested in the production of meat. Wool growing, in consequence, was somewhat neglected, and little attention was paid towards developing the production per animal. While no important increase is expected in the future sheep population of France, it is believed that the industry can be developed and greatly stimulated in Madagascar, in West Africa and in Algeria, Tunis and Morocco. The two large textile organizations in France, the "Comite de la Laine" and the "Federation de Roubaix-Tourcoing" have definitely embarked upon a program of developing the Colonial sheep industry, particularly in French West Africa and in Madagascar.

THE FRENCH WOOL INDUSTRY, CONT'D

FRANCE: Official census of sheep, December 31, 1924

| Department | Rams over one year | Ewes over one year | Wethers over one year | Lambs under one year | Total |
|---|---|---|---|---|---|
| Basses-Alpes ...... | 3,800 | 139,690 | 33,320 | 53,120 | 229,930 |
| Aveyron ........... | 7,160 | 384,000 | 18,276 | 91,480 | 500,910 |
| Bouches-du-Rhone... | 6,800 | 221,590 | 37,760 | 85,540 | 351,690 |
| Cher .............. | 1,870 | 101,370 | 8,640 | 40,910 | 152,790 |
| Corse ............. | 13,600 | 201,000 | 5,500 | 40,000 | 260,100 |
| Drome ............. | 6,110 | 143,950 | 13,010 | 59,570 | 222,640 |
| Eure-et-Loir....... | 1,030 | 188,000 | 28,500 | 68,700 | 286,230 |
| Gard .............. | 4,710 | 132,630 | 33,610 | 38,180 | 209,130 |
| Herault ........... | 3,360 | 130,270 | 22,750 | 29,160 | 185,540 |
| Indre ............. | 2,980 | 151,980 | 25,950 | 82,190 | 263,100 |
| Landes ............ | 3,290 | 124,680 | 11,270 | 24,020 | 163,260 |
| Loiret ............ | 650 | 109,780 | 22,380 | 49,150 | 181,960 |
| Lot ............... | 3,990 | 140,940 | 18,730 | 43,230 | 206,890 |
| Lozere ............ | 3,840 | 118,560 | 24,670 | 45,130 | 192,200 |
| Basses-Pyrenees.... | 6,060 | 210,150 | 25,910 | 38,670 | 280,790 |
| Hautes-Pyrenees.... | 3,790 | 102,460 | 14,110 | 31,740 | 152,100 |
| Seine-et-Marne..... | 1,580 | 158,330 | 32,260 | 74,700 | 266,870 |
| Tarn............... | 4,000 | 112,000 | 30,000 | 33,500 | 179,500 |
| Vienne............. | 4,920 | 139,440 | 24,150 | 61,440 | 229,950 |
| Haute-Vienne....... | 4,710 | 125,940 | 34,780 | 60,960 | 226,390 |
| Other departments | 115,830 | 3,119,590 | 820,080 | 1,374,050 | 5,429,550 |
| Total ............ | 204,080 | 6,256,350 | 1,285,650 | 2,425,440 | 10,171,520 |
| Total 1923 | 204,930 | 6,115,350 | 1,231,880 | 2,373,050 | 9,925,310 |
| " 1922 | 198,400 | 6,028,100 | 1,237,520 | 2,318,400 | 9,782,420 |
| " 1921 | 198,700 | 5,396,520 | 1,138,790 | 2,325,550 | 9,599,560 |
| " 1920 | 202,630 | 5,817,700 | 1,084,690 | 2,300,850 | 9,405,870 |
| " 1913 (1) | 293,640 | 9,288,460 | 2,580,810 | 3,968,480 | 16,131,390 |
| " 1913 (2) | --- | --- | --- | --- | 16,176,000 |

Source: Journal Official. May 29, 1925
(1) Exclusive of Alsace-Lorraine.
(2) Estimated total inclusive of Alsace-Lorraine

## Location of French wool manufacturing industry

Northern France, including the wool textile centers of Roubaix and Tourcoing, Fourmies, Cambrai and the region of Picardy in and about Amiens, constitues one of the largest wool manufacturing centers of the world. The wool textile industry of the district of Roubaix-Tourcoing is by far the most important in France. This center has relatively poor railway service and must draw its industrial water supply by canals from a considerable distance. It has kept its supremacy in the wool textile industry, however, because of its proximity to the important ports of Boulogne, Calais, Dunkirk and Antwerp from which raw materials can be obtained speedily and because of its nearness to the large coal mining districts.

THE FRENCH WOOL INDUSTRY, CONT'D

FRANCE: Distribution of the wool manufacturing industry, January 1, 1923

| District | Combing | | Spinning combed wool | | Spinning carded wool | | Weaving | |
|---|---|---|---|---|---|---|---|---|
| | Factories | Combing units | Factories | Spindles | Factories | Spindles | Factories | Looms |
| Roubaix-Tourcoing...... | 17 | 1,238 | 61 | 1,068,012 | 16 | 153,201 | 66 | 21,852 |
| Fourmies-Cambresis-Picardie....... | 2 | 48 | 68 | 468,235 | 2 | 16,800 | 101 | 13,203 |
| Elbeuf ......... | 1 | 36 | 4 | 22,556 | 31 | 122,812 | 37 | 2,905 |
| Alsace ......... | 10 | 356 | 13 | 505,206 | 1 | 16,000 | 42 | 6,623 |
| Sedan........... | - | - | - | --- | 18 | 80,480 | 23 | 886 |
| Marne .......... | 1 | 38 | 22 | 57,000 | 9 | 22,000 | 23 | 2,500 |
| Vienne ......... | - | - | - | --- | 26 | 73,680 | 47 | 1,940 |
| Midi ........... | - | - | 1 | 5,800 | 43 | 130,000 | 58 | 4,460 |
| Centre ......... | 1 | 20 | 1 | 5,600 | 2 | 31,500 | 2 | 712 |
| Other regions... | 1 | 21 | 21 | 160,000 | 6 | 24,658 | 6 | 328 |
| Totals ...... | 33 | 1,757 | 191 | 2,292,409 | 154 | 679,130 | 405 | 55,409 |

Comitie centrall de la Laine Yearbook, 1923

a/ In addition there are in France about 10,000 hand looms and 1,400 looms for carpet and tapestry making.

## Wool conditioning industry in Mazamet

Great quantities of wooled skins are received at Bordeaux and Marseilles in transit for Mazamet in southeastern France, the center of the French wool-pulling and scouring industry. The annual review of the Chamber of Commerce of Mazamet states that 77,924,000 pounds of wooled skins and 4,477,000 pounds of greasy wool arrived at Mazamet in 1925. In the previous year the arrivals were respectively 75,038,000 pounds of wool-skins and 4,055,000 pounds of greasy wool. The source of the wool conditioned at Mazamet is usually as follows: 45% from Argentina, 32% from Australia, 14% from Uruguay, 6% from South Africa and 3% from other parts of Africa and from Spain and Portugal. After conditioning, this wool is weighed, inspected and analysed by the "Bureau de Conditionnement des Laines" an official bureau controlled by the Mazamet Chamber of Commerce.

WOOL SKINS: Arrivals at Mazamet by port of entry

| From | 1923 | 1924 | 1925 |
|---|---|---|---|
| | Pounds | Pounds | Pounds |
| Bordeaux .................. | 32,988,000 | 26,946,000 | 26,671,000 |
| Marseilles ................ | 26,196,000 | 29,032,000 | 40,933,000 |
| Cette ..................... | 17,729,000 | 10,705,000 | 2,634,000 |
| All others ................ | 6,999,000 | 8,354,000 | 4,696,000 |
| Total ................ | 83,912,000 | 75,037,000 | 74,934,000 |

Source: Annual Review of the Mazamet Chamber of Commerce and forwarded by Consul Lucien Memminger at Bordeaux.

THE FRENCH WOOL INDUSTRY, CONT'D

According to statistics of the "Bureau de Conditionement des Laines" at Mazamet, the total quantity of wool conditioned in 1925 was 38,291,000 pounds as compared with 44,461,000 pounds in 1924. According to this same Bureau the quantity of wool shipped by rail from Mazamet to various foreign and domestic wool manufacturing centers in 1925 was 29,302,000 pounds as compared with 37,421,000 pounds in 1924. The fact that the quantity of wool passing through the conditioning bureau is in excess of the quantity shipped out of Mazamet is due to the fact that considerable quantities of wool are bought by the factories on the spot and are changed into scoured wool in local plants. Certain lots thus pass through the conditioning bureau more than once.

By far the greater part of the wool conditioned and scoured at Mazamet is exported, and more especially to Bradford and other cities in Yorkshire, England. Relatively little is retained for manufacturing in northern France. A certain proportion is retained for manufacture in Mazamet by the local textile mills. The number of spindles in the Mazamet mills and the neighboring town of Labastide- Rouairoux is about 41,000 and of looms 1,150, in addition to which there is a combing mill with 5,800 spindles.

WOOL: Kinds conditioned in Mazamet, 1923-25

| Wool conditioned | 1923 | 1924 | 1925 |
|---|---|---|---|
| | Thousand pounds | Thousand pounds | Thousand pounds |
| Scoured | 21,556 | 15,979 | 14,828 |
| Backwashed | 30,186 | 27,212 | 22,071 |
| Spun wool | 91 | 92 | 24 |
| Weighed only | 784 | 1,178 | 1,368 |
| Total | 52,617 | 44,461 | 38,291 |

Source: Annual Reports of Bureau de Conditionnement des Laines and forwarded by Consul Lucien Memminger at Bordeaux.

French exports and reexports of raw and of semimanufactured wool show decline

Because of the increasing demand for wool in the French wool textile industry the French exports and reexports of raw wool and of semimanufactured wool and wool waste in recent years have been considerably below the pre-war average. Shipments abroad during 1925 were as follows: raw wool 34,000,000 pounds, combed and carded wool 13,000,000 pounds and wool waste 25,000,000 pounds as compared with an annual average of 80,000,000 pounds of raw wool, 58,000,000 pounds of combed and carded wool, and 53,000,000 pounds of wool waste during the five years 1909-13.

THE FRENCH WOOL INDUSTRY, CONT'D

Most of the raw wool exports go to Great Britain and the Economic Union of Belgium and Luxembourg. The next most important outlets are Italy and Switzerland. The Economic Union of Belgium and Luxembourg take most of the French exports of combed and carded wool although Germany, Switzerland, Italy and Great Britain also take considerable quantities. These countries also take the bulk of the French exports of wool waste, the Economic Union of Belgium and Luxembourg in both cases taking almost 50% of the total.

## French in-transit trade in wool

France has always carried on an important "in-transit" trade in wool. In-transit shipments during 1924, the latest year for which statistics are available, amounted to 31,000,000 pounds of raw wool, 4,400,000 pounds of combed and carded wool and about 9,000,000 pounds of wool waste. Most of this wool consisted of shipments to spinning centers in the Economic Union of Belgium and Luxembourg and in Switzerland and Italy. See table on page 807

WOOL: Imports into France, 1909-25 (Special Commerce)

| Year | Raw wool and wooled skins | Combed and carded | Waste |
|---|---|---|---|
| | Pounds | Pounds | Pounds |
| 1909 ........ | 621,752,756 | 572,535 | 27,027,073 |
| 1910 ........ | 606,926,380 | 609,792 | 30,100,065 |
| 1911 ........ | 602,494,693 | 702,606 | 36,467,391 |
| 1912 ........ | 578,392,022 | 711,214 | 33,340,827 |
| 1913 ........ | 592,523,728 | 611,997 | 36,431,235 |
| Average 1909-13 | 600,417,916 | 641,629 | 32,673,318 |
| 1914 ........ | 456,059,209 | 326,501 | 16,651,785 |
| 1915 ........ | 143,567,520 | 3,599,230 | 2,966,951 |
| 1916 ........ | 171,410,075 | 9,060,245 | 7,320,595 |
| 1917 ........ | 133,154,092 | 6,413,843 | 6,554,055 |
| 1918 ........ | 88,941,501 | 3,866,427 | 5,082,705 |
| 1919 ........ | 350,763,544 | 4,289,490 | 10,778,289 |
| 1920 ........ | 362,583,728 | 2,448,870 | 17,274,143 |
| Average 1914-20 | 243,768,524 | 4,286,372 | 9,518,360 |
| 1921 ........ | 335,516,751 | 1,153,888 | 7,876,815 |
| 1922 ........ | 680,572,586 | 717,597 | 13,482,452 |
| 1923 ........ | 577,490,120 | 1,353,624 | 14,528,094 |
| 1924 ........ | 491,935,767 | 2,020,516 | 18,691,481 |
| 1925 ........ | 537,210,976 | 1,679,464 | 19,909,963 |
| Average 1921-25 | 524,545,240 | 1,385,018 | 14,897,761 |

Source: "Special Commerce" as given annually in "Tableau General du Commerce et De La Navigation" for the years 1909-24. Figures for 1925 taken from Special Commerce in the December 1925 issue of "Statistique Mensuelle".

THE FRENCH WOOL INDUSTRY, CONT'D.

WOOL: Aggregate of exports and re-exports from France 1909-25
(Special Commerce)

| Year | Raw wool | Combed and carded | Waste |
|---|---|---|---|
| | Pounds | Pounds | Pounds |
| 1909 ..... | 90,909,327 | 63,993,365 | 49,95 ,709 |
| 1910 ..... | 81,712,838 | 56,277,045 | 59,783,902 |
| 1911 ..... | 60,898,679 | 55,741,768 | 53,388,798 |
| 1912 ..... | 87,787,833 | 68,067,686 | 52,121,594 |
| 1913 ..... | 78,707,968 | 47,116,491 | 52,010,482 |
| Average 1909-13 | 80,003,329 | 58,239,271 | 53,451,497 |
| 1914 ..... | 67,365,962 | 39,601,230 | 30,535,033 |
| 1915 ..... | 10,946,941 | 237,215 | 280,866 |
| 1916 ..... | 20,710,012 | 501,987 | 2,109,802 |
| 1917 ..... | 9,878,592 | 557,543 | 114,639 |
| 1918 ..... | 89,082 | 593,919 | 132,276 |
| 1919 ..... | 8,057,152 | 6,336,241 | 9,672,021 |
| 1920 ..... | 33,095,896 | 33,942,683 | 32,548,053 |
| Average 1914-20 | 21,449,091 | 11,678,688 | 6,585,641 |
| 1921 ..... | 33,074,952 | 36,875,462 | 23,507,870 |
| 1922 ..... | 47,112,302 | 45,974,728 | 40,029,584 |
| 1923 ..... | 45,593,994 | 39,959,698 | 37,927,938 |
| 1924 ..... | 37,491,207 | 40,823,901 | 36,564,834 |
| 1925 ..... | 33,636,949 | 12,826,804 | 25,092,537 |
| Average 1921-25 | 39,391,831 | 35,292,118 | 32,624,553 |

"Special Commerce" as given annually in "Tableau General du Commerce et De La Navigation" for the Years 1909-24. Figures for 1925 taken from Special Commerce in the December 1925 issue of "Statistique Mensuelle".

WOOL: French in-transit trade, 1909-24

| Year | Raw wool | Combed and carded | Waste |
|---|---|---|---|
| | Pounds | Pounds | Pounds |
| 1909 ..... | 18,360,570 | 4,856,513 | 2,382,511 |
| 1910 ..... | 16,097,328 | 4,451,969 | 3,067,921 |
| 1911 ..... | 23,379,342 | 2,617,081 | 2,902,356 |
| 1912 ..... | 20,105,732 | 3,564,858 | 2,560,863 |
| 1913 ..... | 19,680,023 | 2,956,589 | 4,162,285 |
| Average 1909013 | 19,524,599 | 3,689,398 | 3,015,187 |
| 1914 .... | 7,315,524 | 983,031 | 2,026,689 |
| 1915 ..... | 3,730,404 | 135,803 | 84,657 |
| 1916 ..... | 12,863,400 | 137,567 | 240,742 |
| 1917 ..... | 10,995,222 | 366,184 | 196,430 |
| 1918 ..... | 8,725,366 | 578,046 | a/ |
| 1919 ..... | 5,168,905 | 1,516,544 | 648,593 |
| 1920 ..... | 5,389,806 | 887,131 | 3,474,229 |
| Average 1914-20 | 7,741,232 | 657,758 | 1,111,890 a/ |
| 1921 ..... | 14,829,683 | 1,910,286 | 1,359,577 |
| 1922 ..... | 28,958,964 | 5,400,388 | 3,764,134 |
| 1923 ..... | 31,058,846 | 5,790,161 | 6,539,505 |
| 1924 ..... | 31,033,272 | 4,356,069 | 3,931,716 |
| Average 192k024 | 26,470,191 | 4,364,226 | 5,148,733 |

"Special Commerce" as given annually in "Tableau General du Commerce et De La Navigation" for the years 1909024.

a/ No intransit statistics given for 1918. The average is for the six years for which statistics are given.

THE FRENCH WOOL INDUSTRY, CONT'D

FRANCE: Statistical summary of the wool trade

| Movement | Raw wool and wooled skins | Combed and carded | Waste |
|---|---|---|---|
| | Pounds | Pounds | Pounds |
| IMPORTS | | | |
| Average | | | |
| 1909-13 | 600,417,916 | 641,629 | 32,673,318 |
| 1914-20 | 243,768,524 | 4,286,372 | 9,518,360 |
| 1921-25 | 524,545,240 | 1,385,018 | 14,897,761 |
| EXPORTS | | | |
| Average | | | |
| 1909-13 | 80,003,329 | 58,239,271 | 53,451,497 |
| 1914-20 | 21,449,091 | 11,678,688 | 6,585,641 |
| 1921-25 | 39,391,881 | 35,292,118 | 32,624,553 |
| RETAINED | | | |
| Average | | | |
| 1909-13 | 520,414,587 | - 57,597,642 a/ | - 20,778,179 a/ |
| 1914-20 | 222,319,433 | - 7,392,316 a/ | 2,932,719 |
| 1921-25 | 485,143,359 | - 33,907,100 a/ | - 17,726,792 a/ |
| IN-TRANSIT | | | |
| Average | | | |
| 1909-13 | 19,524,599 | 3,689,398 | 3,015,187 |
| 1914-20 | 7,741,232 | 657,758 | 1,111,890 b/ |
| 1921-24 | 26,470,191 | 4,364,226 | 5,148,733 |

Source: "Special Commerce" as given annually in "Tableau General du Commerce et De La Navigation" for the years 1909-24.

a/ Minus signs indicate that exports exceeded the given imports by the quantities indicated.

b/ No intransit statistics given for 1918. The average is for the six years for which figures are given.

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## COMPETITION OF COTTON GOODS WITH THE LINEN INDUSTRY IN GERMANY

German manufacturers of linen goods intend to join in a concerted effort to assist the domestic linen industry by propaganda for an increased use of its products, reports Consul Steger at Dresden. Germany formerly consumed an amount of linen goods far in excess of the average for most other countries. Not only has competition with cotton affected the linen industry, but it has caused considerable reduction in the area in Germany. Fifty years ago the annual area averaged about 625,000 acres. This has decreased gradually, until in 1913 it had dropped to little more than 41,000 acres. During the war government encouragement resulted in an increase of the area to 140,000 acres in 1920. Since that year it has again decreased, and in 1925 the total area planted to flax was about 83,000 acres. Production from this area is sufficient to supply about one-half of the German spindles.

Practically all branches of the linen industry have recently been passing through one of the most critical periods in their history, as a result of the enormous decrease in sales as compared with pre-war years. Since the stabilization of the currency, export sales have dropped off steadily, due to the higher production costs in Germany, which hamper local manufacturers in competition with the industries of Belgium, Ireland, and other producing countries. More important, however, is the decrease in sales within Germany itself. Reductions in German purchasing powerhas resulted in an inability to purchase the more expensive linen weaves. Therefore cotton has largely replaced linen in household use, and for underclothing. In view of the decreased market for linen goods, many weaving mills in East Saxony and Silesia have turned to the manufacture of cotton fabrics, or cotton mixed with linen. This change has been especially noticeable in the last year.

The campaign to increase the consumption of linen goods will be carried on chiefly through the sales forces of the retail stores, by calling to the attention of the customers the advantages over the materials which have been replacing them recently to such a large extent. Particular emphasis is to be placed on the superior qualities of linen goods as compared with goods made from cotton. At the same time an educative advertising campaign is being planned.

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## IMPROVED HEMP PROSPECTS IN SOUTHERN ITALY

The damage to the hemp crop in Southern Italy from dry weather in April has been relieved by May rains and the plants are blossoming well, according to a cablegram received in the Department of Agriculture from Consul Byington at Naples. The prospect at present is for superior quality but a smaller yield than last year. Vice Consul Schott at Naples reports that large stocks, estimated at 40 million pounds were on hand in the middle of April, whereas last year no stocks were carried over. The quality of the 1924 crop, however, was excellent while last year's crop was generally much inferior. Average prices now prevailing are materially lower than those of last year.

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## THE BELGIAN TEXTILE INDUSTRY FOR APRIL

The demand for raw cotton in Belgium was good in April, reports Consul MacEachran at Ghent, but Indian cotton sold much better than America. Arrivals of American cotton were only 15,000 bales compared with 30,000 bales of Indian. If these figures are in running bales, the difference is not quite so great as the figures indicate, since the Indian bale averages about 80 pounds less than the American.

At the beginning of April little business was being done in cotton yarns on account of the fluctuations in exchange. Toward the middle of the month, however, there was a noticeable improvement. The mills were working normally throughout the month and were well booked up with orders, chiefly for home consumption. Export business fell off slightly, but spinners were confident that by the month of May an improvement would be shown.

The situation in the cotton weaving industry in Flanders during April was normal and most of the mills were well booked up with orders chiefly for export. New orders were scarce, however, probably because of the fluctuations in exchange which caused buyers to hold off. The further depreciation of the Belgian franc had some effect in making French competition less keen during the month.

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GRAINS: Exports from the United States, July 1-May 29, 1924-25 and 1925-26
PORK: Exports from the United States, July 1-May 29, 1924-25 and 1925-26

| Commodity | July 1-May 29 | | Week ending | | | |
|---|---|---|---|---|---|---|
| | 1924-25 | 1925-26 a/ | May 8 1926 | May 15 1926 | May 22 1926 | May 29 1926 |
| GRAINS: | 1,000 bushels | 1,000 bushels | 1,000 bushels | 1,000 bushels | 1,000 bushels | 1,000 bushels |
| Wheat | 186,482 | 54,835 | 950 | 3,359 | 2,810 | 1,993 |
| Wheat flour | 62,148 | 40,876 | 630 | 489 | 381 | 794 |
| Rye | 47,100 | 11,252 | 263 | 1,452 | 564 | 733 |
| Corn | 7,286 | 20,932 | 317 | 332 | 278 | 297 |
| Oats | 8,080 | 29,024 | 311 | 1,384 | 704 | 239 |
| Barley | 20,618 | 25,749 | 585 | 203 | 505 | 75 |
| PORK: | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds | 1,000 pounds |
| Hams & shoulders, inc: Wiltshire sides | 257,354 | 197,774 | 2,080 | 2,465 | 1,921 | 1,966 |
| Bacon, including Cumberland sides | 228,611 | 176,308 | 3,832 | 3,535 | 2,406 | 3,672 |
| Lard | 727,106 | 625,804 | 11,573 | 11,094 | 11,362 | 12,966 |
| Pickled pork | 24,219 | 25,776 | 384 | 304 | 161 | 183 |

Compiled from official records of the Bureau of Foreign and Domestic Commerce.
a/ Revised to April 30, 1926, including exports from all ports. b/ In terms of bushels of wheat. c/ Includes flour milled in bond from Canadian wheat.

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BUTTER: Prices in London, Copenhagen and New York.

(By Weekly Cable)

| Market and Item | May 28, 1926 | June 4, 1926 | June 5, 1925 |
|---|---|---|---|
| New York, 92 score | 41.00 | 41.00 | 43.00 |
| Montreal No. 1, pasteurized | 34.00 | 34.00 | b/ |
| Copenhagen, official quotation | 34.56 | 37.44 | 38.33 |
| Berlin, la quality | 33.28 | 32.41 | b/ |
| London: a/ | | | |
| Danish | 37.15 | 38.67 | |
| Dutch, unsalted | 35.84 | 36.28 | 38.84 |
| Irish | - - - | 36.72 | 37.76 |
| New Zealand | 36.72 | 37.58 | 37.32 |
| New Zealand, unsalted | 37.15 | 38.02 | 38.84 |
| Australian | 36.06 | 36.94 | 35.15 |
| Australian, unsalted | 36.72 | 37.15 | 36.46 |
| Argentine, unsalted | 32.37 | 34.11 | 33.63 |
| Siberian | 32.15 | 32.59 | 32.12 |
| Esthonian | 35.63 | 35.84 | |

Quotations converted at exchange of the day. a/ Quotations of following day.
b/ Not received at that time.

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EUROPEAN LIVESTOCK AND MEAT MARKETS
(By Weekly Cable)

| Market and Item | Unit | Week ending May 26, 1926 | June 2, 1926 | June 3, 1925 |
|---|---|---|---|---|
| GERMANY: | | | | |
| Receipts of hogs, 14 markets | Number | 35,295 | 49,525 | 37,906 |
| Prices of hogs, Berlin | $ per 100 lbs | 16.53 | 16.10 | 15.34 |
| Prices of lard, tcs. Hamburg | " | 18.24 | 18.39 | 18.47 |
| UNITED KINGDOM AND IRELAND: | | | | |
| Hogs, certain markets, England | Number | 9,246 | 8,611 | 8,184 |
| Hogs, purchases, Ireland | " | 21,369 | | 17,492 |
| Prices at Liverpool: | | | | |
| American Wiltshires | $ per 100 lbs | 25.20 | - - - | 21.70 |
| Canadian " | " | 26.94 | 27.16 | 23.76 |
| Danish " | " | 29.55 | 29.55 | 27.22 |
| Imports, Great Britain: a/b/ | | | | |
| Mutton, frozen | Carcasses | | 86,357 | |
| Lamb, " | " | | 84,854 | |
| Beef, " | Quarters | | 2,338 | |
| Beef, chilled | " | | 62,779 | |
| DENMARK: | | | | |
| Exports, of bacon a/ | 1,000 lbs. | | 6,673 | |

a/ Received through the Department of Commerce. b/ Week ending Tuesday preceding date indicated.

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